

# Triple Task Method: Systemic, Reflective Action Research

Simon Bell · Stephen Morse

© Springer Science+Business Media, LLC 2010

**Abstract** This brief article introduces a new methodology for systemic action research—Triple Task (TT)—and sets out its rationale and initial progress in becoming an embedded method for group working. Arising from the authors previous work with soft systems approaches, the Imagine method for sustainable development assessment and action research in a variety of global locations, TT provides a means for groups to engage together in purposive work and, at the same time, for facilitators to understand how the dynamic of the group influences the groups output. TT is based on an ambitious concept and at the time of writing the results of TT applied in the context of an EU Framework 7 funded project are in their early stages but importantly, significant insights are already arising including the answers to some puzzling questions:

- Do purposeful groups always produce the most insightful outcomes?
- Do conflictual groups produce incoherent results?
- What makes a ‘good’ group?

**Keywords** Triple task method · Participatory approaches · Action research

## Background

Triple Task (TT) is a unique form of participatory action research in the sense that not only does it attempt to arrive at answers to research questions but also tries to understand what factors may have been at play in arriving at those answers. This attribute makes TT an

---

S. Bell (✉)  
Open University, Milton Keynes, UK  
e-mail: S.G.Bell@open.ac.uk

S. Bell  
Bayswater Institute in London, London, UK

S. Morse  
Geography Department, University of Reading, Reading, UK  
e-mail: s.morse@reading.ac.uk

advance on many other participatory techniques which are more focussed on delivering outputs (representing an apparent ‘consensus’) and less concerned (if at all) on the dynamic behind that ‘consensus’ and how the process may have influenced what was produced.

Participatory research takes many forms but the underlying philosophy is that all those involved—be they ‘researcher’ or ‘researched’—are involved in the design of a research process as well as the interpretation of findings. Power should be shared rather than being concentrated in the hands of a researcher. As a result the very process of doing the research can provide many insights and help bring about positive change. Hence the term ‘action research’; a research process that catalyses action.

Most participatory action research methods stop at the point where outputs have been achieved, with no attempt to appreciate the dynamics that may have been at play within the group to arrive at those outputs. Therefore while it is likely that within each group there will be some variation in perspective, as well as the meaning of terms such as ‘effectiveness’, participatory techniques tend to hide this and aim instead for an apparent consensus. Unlike many other approaches to action research, TT begins with an assumption that it is not only what groups achieve while working together that matters but also the factors at play which have allowed them to get to where they have arrived at. The latter may be multi-faceted, of course, and include the context within which members of the group work and their profession. In addition to these factors is the group dynamic; the way in which the group functioned. TT assumes that an understanding of this maelstrom of influence can help with an understanding as to why insights were arrived at and thus help with an appreciation of variation that may be seen between groups. Until now this association has been anecdotal. Experienced workshop facilitators can ‘tell’ when a workshop has worked well, whether some groups have been more insightful than others, whether the dynamics within some groups or the background of the individuals within those groups have hindered or helped their process of discovery and so on. But there has been no attempt to date to formalise the latter. Instead it has often been taken as read. During debrief sessions comments such as the following are often given by facilitators:

‘Group X has had problems with its internal dynamics—no wonder the outputs were unimaginative.’

‘Group Y was dominated by one individual but the others in the group seemed to be happy with that and they certainly had no trouble producing expected results.’

There is a clear learning association between outputs and process and TT starts from that point and attempts to formally elucidate what they may be. Eventually, and in a generalised sense, it may be possible to have a typography of groups with ‘outputs’ and ‘process’ as axes and this may perhaps allow the identification of clusters which link these two variables (taking into account changes over time and group makeup). The key assumption here is that prior experience in action research can help inform facilitators in such ways as to enhance the effectiveness of the process. Critically, the typology provides a device for facilitator-learning.

This paper describes an outline of the TT process and provides a taste of typography that may result. The latter is based on findings from an EU Framework 7 funded project called POINT (Policy Influence of Indicators).

### **Triple Task Process**

TT involves three tasks. Task 1 generates the groups answers to research questions while Tasks 2 and 3 are designed to explore the ways in which the groups function and how this

influences their analysis both in terms of what emerges under Task 1 but also in terms of the variation one might see between members of the group and how they are able to influence the dynamic. From the perspective of participants they only experience Task 1; Tasks 2 and 3 are largely invisible to them and are employed to help generate the typology. The findings from Task 2 and 3 are not necessarily fed back to the participants in the current research, however, a ‘do-it-yourself’ version of TT is in design, allowing participants in the process full access to all the group’s data and (resulting from this) a diagnostic tool for group dynamic improvement.<sup>1</sup>

### Task 1

This is derived from systems approaches, specifically a combination of the Soft systems methodology/review of groups’ assessment of a variety of tasks and issues (Checkland and Scholes 1990; Haynes 1995; Bell 2000; Checkland and Jayastna 2000; Mingers 2001; Winter and Checkland 2003). In TT SSM is blended with worked/practitioner approaches derived from Participatory Appraisal methods (Chambers 2002; Bell and Morse 2004; Creighton 2005; Barnes et al. 2007; Gottschick 2008) and elements from the psychodynamic tradition—e.g. Bridger’s Double Task (Klein 2001, 2006; Bridger 2007). Task 1 is the main element of TT in the sense that it is the task which is visible to the groups and will provide the insights with regard to the research questions (what has been done, by whom, why, how is this assessed in terms of effectiveness?). For convenience, Task 1 is also subdivided into three main steps as set out below.

#### *Scoping*

A Rich picture (Fig. 1) is employed as a means to capture ‘stories’ from participants. The Rich picture is an important element of Task 1 and each group begins with a pictorial representation of the significant components and linkages of the system being explored in the research. The picture should represent a shared understanding, although in practice it is perfectly possible for a group to be dominated by an individual or individuals who impose their own vision from the onset. The Rich picture is a mental group map and thus is an essentially qualitative analysis and participants are encouraged to use the minimum of text. Figure 1 is an example of a Rich Picture. Following from the Rich Picture the participants are encouraged to draw out major tasks and issues which form a central concern to them. These are then organised in terms of precedent and priority. Groups of linked tasks and issues are ‘clustered’ into indicative systems of concern (Systems of Challenges; SoCs). This systemic process binds the group together, forges collective understanding and provides a legitimising process of further discovery.

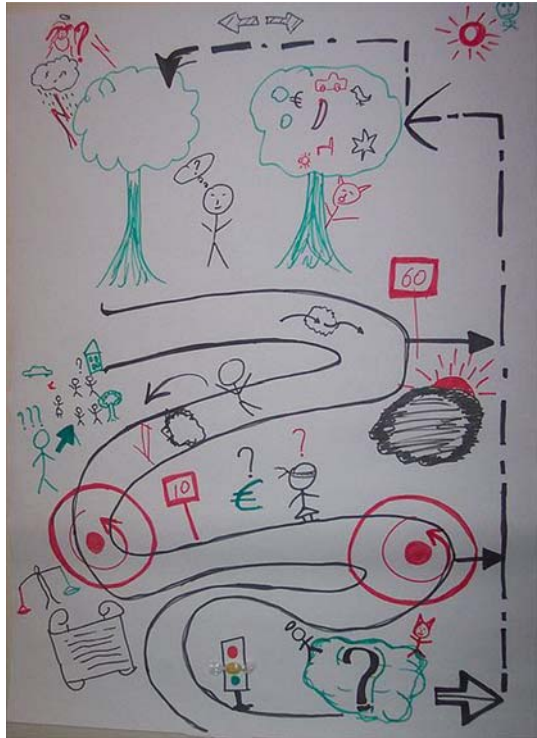
#### *Visions of Change (VoCs)*

Moving from a shared understanding as to the challenges this step encourages the groups to explore what changes are required in order to address the SoCs. In other words, what needs to be done? Groups may derive a number of VoCs rather than only one, but the emphasis should be upon what the group deems to be more important and achievable.

---

<sup>1</sup> The authors are aware of the danger of a research method presenting as a means to extract data and not share findings in partnership between researcher and researched. The ‘do-it-yourself’ version of TT will help to address this concern. Much more will be said about this in subsequent papers.

**Fig. 1** Example of a Rich Picture created within Task 1. This example explores the influence of indicators in sustainable development, Malta



### *Desired Change*

Groups encouraged to set out what practical steps are required to bring about their Vision of Change. This step is supplemented by activity planning and scenario setting: ‘How might things look given certain kinds of change?’ The latter employs another Rich Picture—a futurescape; providing a sort of ‘before’ and ‘after’ story when placed next to the rich picture that arose out of Step 1. It also provides the group with the potential to backcast from the potential scenario. Participants not only enrich their own understanding of what is possible but act as vectors of change for colleagues.

### Task 2

This is an ‘outside in’ review of the group dynamic. In effect it is the researcher’s assessment of the group process using a matrix approach originally developed at the Open University and known as BECM (used in, for example, the Open University Course: ‘Managing Complexity: a systems approach’, Open University 2000). BECM stands for Being, Engaging, Contextualising and Management. BECM can be used as a form of Socio-Analysis and is related to the psychoanalytic tradition.

### Task 3

‘inside out’ review of the group dynamic—stakeholders’ assessment of their group process. Task 3 employs the Symlog (A SYstem for the Multiple Level Observation of

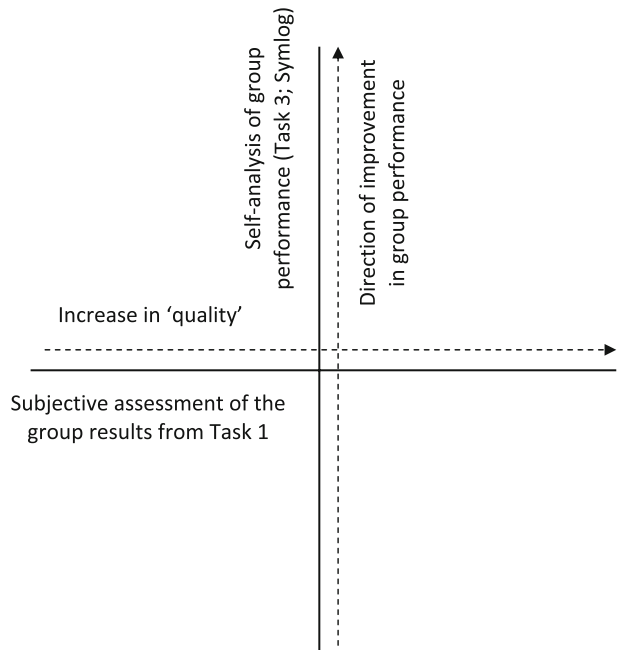
Groups) methodology which is outlined at [www.symlog.com](http://www.symlog.com). Symlog has been applied in a wide range of situations and examples can be found in Park (1985), Wall and Galanes (1986), Nowack (1987), Keyton and Wall (1989), Hurley (1991), Blumberg (2006).

Tasks 2 and 3 represent different ways of looking at group behaviour. Previous studies have shown that such perspectives can overlap although there are also points of difference. Isenberg and Ennis (1981) for example, compared the results of an analysis based on Symlog with those from Multi-Dimensional Scaling (MDS) which derives dimensions based on a perceived similarity of group members. They found that Symlog and MDS had statistically significant overlaps. The authors have done similar analyses with Symlog and BECM and there are also statistically significant overlaps although the results are not presented here.

In an active research context there are a range of possibilities as to the make-up of the groups that could engage in TT (or indeed any group-based participatory process), and decisions are often made after prior literature reviews. For example, there may be five to six workshops spanning a number of locations around a given geographic spread, chosen because they may be expected to provide a range of answers to the research questions. Alternatively the focus could be on one place with workshops held across a range of different types of stakeholder in that place. The former would provide a more geographical spread of insight while the latter would allow for more in-depth and socio-economic stratification.

Each TT workshop usually comprises some 20 or so people divided into 3 to 4 groups, with the nature of the division depending upon the outcome of the prior literature review phase. For example, a workshop may comprise individuals from a community group in which case they would be asked to divide themselves into three teams and asked to address a particular question. Each workshop would last 1–2 days. The information collected from the workshop would be analysed with qualitative techniques developed by Bell and Morse (2009). One of which is the ‘Triple Task’ field diagram (Fig. 2) which sets out findings

**Fig. 2** The Triple Task field diagram and interpretation. This is the basic framework. In Fig. 5 the groups are plotted as *circles* into this two-dimensional space, with the size and *shading of the circle* representing performance as assessed using the BECM criteria (Task 2)



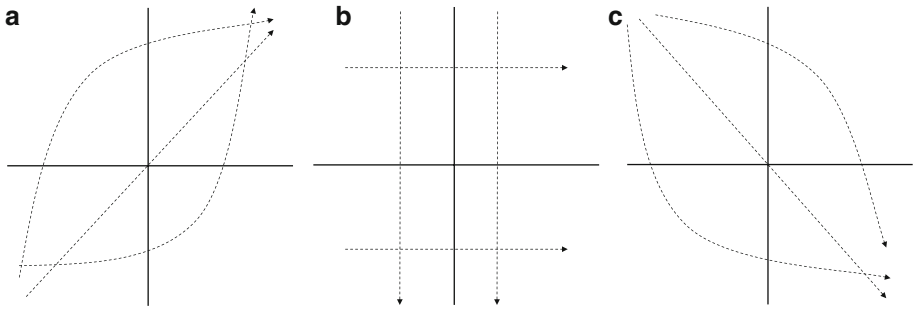
from the three strands of Triple Task plotted against each other. The horizontal axis is used for Task 1 and the vertical axis for Task 3 (Symlog; self-analysis of group performance). Groups would be represented by circles within this 2-dimensional axis, with the size of the circle for each group is used to denote BECM (Task 2).

The quadrants of Fig. 2 can be represented (albeit) simplistically as shown in Fig. 3. If a large number of groups are plotted into the Triple Task field diagram then it may be possible to identify patterns in terms of placement within the field diagram. Do groups from a similar background appear in the same place? In effect the four quadrants represent a generalised typology of groups and this allows questions to be asked as to why groups are where they are, and how this could potentially translate into ‘action’. As an extension of this typology it may also be worthy to consider assumed transects within any cluster of groups and what may rest behind it. A cluster of groups occupying one or more quadrants may suggest an orientation pointing in a direction within the space. Again, this may suggest a relationship between the quality of outputs from Task 1 and the way in which the group worked and in turn this could provide some clues as to how the group-led analysis may translate into action. This is all somewhat speculative at present, as will be discussed later, but patterns within the Triple Task field diagram may be useful indicators.

Figure 4 provides a few examples of transects (vectors) that may occur between groups in the field diagram. Figure 4a may be regarded as perhaps the ‘expected’ transects where good group performance equates with good quality Task 1 outputs. Perhaps this implies that these groups are most likely to translate their analysis into action. Figure 4b is a set of transects which if found spanning the length of each transect may imply no linkage between group performance and quality. Figure 4c is perhaps the most exciting of all; here

**Fig. 3** Indicative meaning of group placement within the TT field diagram

<p><b>Quadrant 1 “Disinterested Team”</b></p> <p>Expected characteristics – High group function but low quality output – is the group interested in what it is doing? Does it value the process? Possibly switched off from the process?</p>	<p><b>Quadrant 2 “Well oiled machine”</b></p> <p>Expected characteristics – High group function and high quality outputs – a well organised and engaged group of people who overcome any initial problems of the group makeup and work well on the task suggested.</p>
<p><b>Quadrant 3 “So what?”</b></p> <p>Expected characteristics – Low group function and low quality outputs – the group does not rise over any issues which it has as a divergent set of individuals. They do not engage well in the task and cannot function as the process would expect.</p>	<p><b>Quadrant 4 – “Conflict Mavericks”</b></p> <p>Low group function and yet high quality output. Very interesting group which performs well on the task despite possible conflict and issues over group membership. Here we have high output arising in part as a consequence of the problems which the group has. Does this quadrant represent the best space for novel insights to emerge?</p>



**Fig. 4** Some expected transects within the Triple Task field diagram. **a** ‘So what to the well oiled machine’. The assumption here is that good group performance (as assessed by themselves and outsiders) will equate to good outputs and vice versa. **b** Paralleling. No relationship between group performance and quality of the Task 1 outputs. **c** Disinterested to the conflict mavericks. Here there is an interesting hypothesis that conflict and disharmony within groups can be constructive and lead to good quality Task 1 outputs

the relationship is inverse of what may be expected suggested that conflict and disharmony (poor group performance) actually generates good quality outputs. How this may translate into action is uncertain. The dynamic, while productive, could have generated an off-putting experience and members of the group may be glad to see the end of the process. Alternatively the intensity of the dynamic may generate long-lasting influences.

A plot of many groups in the field diagram could—of course—encompass all of the transects and assumptions in Fig. 4 and can really only be seen as clues rather than an attempt to analyse in any empirical or statistical sense. However, it is noteworthy that each transect does not curve back on itself—it only goes in one direction. Thus groups cannot show an improvement with quality of Task 1 outputs with increasing group performance with an inflection point occurring at some point after which quality of Task 1 outputs declines with increasing group performance. A single transect can only travel in one direction.

Triple Task is Action Research in terms of its orientation and the researcher/interpreter has to be very careful not to take the field diagram too literally. Generalised typologies and orientation of clusters are useful only in so far that they can allow practitioners to identify potential patterns and thus enhance the action research experience. It is important not to see such workshops in isolation of prior AR experience. In addition to this it is often the case that each workshop will be informed by a prior literature review phase and provide valuable insights for following, in-depth Action Research components. This could be at a number of levels. Firstly, the experiences gained from those involved in TT might help with selection of who to include in AR. Secondly the insights from TT could provide a basis for some focus within Action Research rather than start with a clean sheet.

### Triple Task in Action

The Triple Task approach was originally developed by Bell and Morse (2009). The approach was first used by the authors in the European Union Seventh Framework Programme (FP7/2007-2013) under the grant agreement no. 217207: POINT (Policy Influence of Indicators project). POINT is a pan-European project involving researchers from across the Union. It’s explicit objectives are to:

Design a coherent framework of analysis and generate hypotheses on the use and influence of indicators, by pulling together the disparate strands of research and practical experience of indicator use and influence, focusing broadly on European policies, but with a special emphasis on fostering change towards sustainability. Test the analytical framework and the hypotheses on specific cases of sector integration and sustainability indicators, as well as composite indicators (indices) in order to:

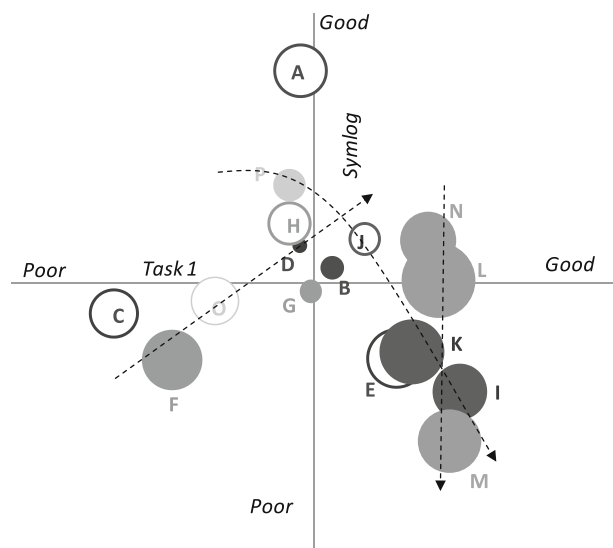
- identify the ways in which indicators influence policy, including the unintended types of influence and situations of ‘non-use’; and
- identify factors that condition the way in which indicators influence policies, including the technical methods of production, the process and the outcome of designing and producing indicators, the type of indicators, expectations of stakeholders involved, the role of the organisations preparing and disseminating the indicators, as well as general socio-cultural and political background factors.
- Recommend ways to enhance the role of indicators in supporting policies (POINT project document, see <http://point.pbworks.com/>).

TT is specifically related to Stakeholder analysis within the project. This Stakeholder work package was specifically intended to undertake workshops:

Seven in-country workshops will be organised.... A stakeholder-led analysis will be conducted in each workshop, resulting in a report based upon a meta-analysis of the findings from the workshops. One objective of the workshops is to foster peer group learning whereby the participating indicator practitioners will learn from each other just as much as researchers learn from the practitioners (<http://point.pbworks.com/WP6+-+Role+of+stakeholders>).

At the time of writing the research is in its synthesis phase and a field diagram for 16 groups is shown as Fig. 5. There are groups in unexpected places, notably the strong showing in the ‘conflict maverick’ quadrant. Various transects from Fig. 5 can be drawn

**Fig. 5** Results from groups engaged in the POINT project arranged in a Triple Task Field Diagram. Size of each circle and whether it is filled or not is related to the BECM score over the workshop. Three vectors are shown here suggesting orientations for different clusters of groups. Letters denote results from different groups: A, B Malta, C–H Slovakia, I–K Finland, L–N Denmark, O, P UK. Size of each circle and whether it is filled or not is related to the BECM score over the workshop. Three vectors are shown here suggesting orientations for different clusters of groups.





through the groups and the suggestion here is that various assumptions can be made as to how quality of output is related to group performance. Some seem to imply a paralleling (Fig. 4b) while others are lined up in an expectation of ‘so what to the well oiled machine’ (Fig. 4a); but the latter is only to a point given that the transect does not fully enter the ‘well oiled machine’ quadrant’. Care does have to be taken in assuming that transects extend beyond the cluster of groups they are dissecting.

In preliminary answer to our initial questions, we suggest the following interim comments based upon the typology and orientations in Fig. 4:

- Do purposeful groups always produce the most insightful outcomes?

Not necessarily so. Groups on fixed purpose often produce results which are dependable but pedestrian. They find what they expect to find and report the same.

- Do purposeful groups always produce the most insightful outcomes?

No. Conflicted groups have a very good chance of producing insight and step change vision.. so long as their internal conflict can be harnessed.

- What makes a ‘good’ group?

Diversity and inclusion. These qualities will tend to produce conflict and insight.

### Triple Task Critique

Triple Task attracts much the same critique as participatory action research in general. It is open to the charge that dominant individuals within groups can heavily influence the outputs and that the process can hide much diversity in perspective. While the latter is included in the earlier stages of the process the tendency is to focus on relatively few ‘priority’ issues and tasks. The inclusion of Task 2 and 3 help with an elucidation as to why a group may have travelled the road it do but they do not interfere with the direction the group has taken; all these tasks do is monitor and help explain what occurs to as to aid facilitators.

As with many such participatory-based processes Triple Task is typically initiated from outside the community engaged in its practice. There is nothing preventing a community from making a decision to engage in Triple Task or to bring in outsiders to run the process for them, but these are not the norm. Hence for the most part the reality is that Triple Task will be facilitated by outsiders who can use the information from Tasks 2 and 3 to help build their knowledge-base. However, as noted earlier, the authors are at the time of writing developing a Do-it-yourself version of TT. It is hoped that this will provide participants with greater freedom to develop their own group processes and improve their group dynamic.

**Acknowledgements** The research leading to these results has received funding from the European Commission’s Seventh Framework Programme (FP7/2007-2013) under the Grant Agreement No. 217207 (POINT Project, [www.point.pb-works.com](http://www.point.pb-works.com)).

### References

- Barnes M, Newman J et al (2007) Power, case studies in public participation, participation and political renewal. London Policy Press, London
- Bell S (2000) Finding out rapidly: a soft systems approach to training needs analysis in Thailand. In: Wallace T (ed) Development and management. Oxfam Publication in association with the Open University, Oxford

- Bell S, Morse S (2004) Experiences with sustainability indicators and stakeholder participation: a case study relating to a 'Blue Plan' project in Malta. *Sust Dev* 12:1–14
- Bell S, Morse S (2009) Participatory visioning of indicator use. In: International sustainable development research conference, Utrecht
- Blumberg HH (2006) A simplified version of the SYMLOG (R) trait rating form. *Psychol Rep* 99(1):46–50
- Bridger H (2007) The consultant and the consulting process. In: Handout at the midhurst working conference, The Bayswater Institute London
- Chambers R (2002) Participatory workshops: a sourcebook of 21 sets of ideas and activities. Earthscan, London
- Checkland P, Jayastna N (2000) The soft systems reseach discussion group: taking stock, background, current position, future direction. Universtiy of Salford, Salford
- Checkland PB, Scholes J (1990) *Soft systems methodology in action*. Wiley, Chichester
- Creighton J (2005) *The public participation handbook: making better decisions through citizen involvement: a practical toolkit*. Pfeiffer Wiley, Chichester
- Gottschick M (2008) Participatory sustainability impact assessment: scientific policy advice as a social learning process. *Syst Pract Action Res* 21(6):479–495
- Haynes M (1995) *Soft systems methodology*. In: Ellis K (ed) *Critical issues in systems theory and practice*. Plenum, New York, pp 251–257
- Hurley JR (1991) Self-acceptance, acceptance of others, and SYMLOG: equivalent measures of the two central interpersonal dimensions? *J Clin Psychol* 47(4):576–582
- Isenberg DJ, Ennis JG (1981) Perceiving group members: a comparison of derived and imposed dimensions. *J Pers Soc Psychol* 41(2):293–305
- Keyton J, Wall VDJ (1989) Symlog. Theory and method of measuring group and organisational communication. *Manag Commun Q* 2(4):544–567
- Klein L (2001) On the use of pshychoanalytic concepts in organizational social science. *Concept Transform* 6(1):59–72
- Klein L (2006) Joan Woodward memorial lecture—applied social science: is it just common sense? *Hum Relat* 59(8):1155–1172
- Mingers J (2001) An idea ahead of its time: the history and development of soft systems methodology. *Syst Pract Action Res* 13(6):733–756
- Nowack W (1987) SYMLOG as an instrument of internal and external perspective taking—construct-validation and temporal change. *Int J Small Group Res* 3(2):180–197
- Open University (2000) T306 managing complexity: a systems approach. Open University, Milton Keynes
- Park JH (1985) SYMLOG as a method of a team diagnosis of soccer teams. *Int J Sports Psychol* 16(4):331–332
- Wall VDJ, Galanes GJ (1986) The SYMLOG dimensions and small group conflict. *Cent States Speech J* 37(2):61–78
- Winter M, Checkland P (2003) Soft systems: a fresh perspective for project management. *Civil Eng* 156:187–192